Backend Workflow System

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Workflow Types

There are different types of workflows that can be used.

Automatic Workflows

1. ORDER / Quotation

Workflow is triggered when one of the following conditions from <Role>/Workflow applies:

ORDER / Quotation	**Condition**
Header discount	
Manual price	Price changed, Internal note added
Item discount	
Complimentary item	Rebate in kind and right Manual price must be granted
Complimentary item	Price changed and right Manual price must be granted

2. Complaint

Workflow is triggered when "Complaint" is activated in <Role>/Workflow.

Manual Workflows

The following workflows can be triggered manually:

1. Customers
   - Call: in the Customer Dashboard via the "Workflow" widget
2. Activities
   - Call: Create activity and Save. On the Summary page via the kebab menu
3. Appointments
   - Call: In an Appointment via the kebab menu
   - When Editing an Appointment via the kebab menu
   - Via the List View when calling an Appointment in the kebab menu
4. Visits
   - Call: At Visit conclusion via the kebab menu
5. Contacts
   - Call: In the Contact via the kebab menu
6. Company

- Call: One-time on the Dashboard via the 1x1 or 1x4 "Workflow" widget

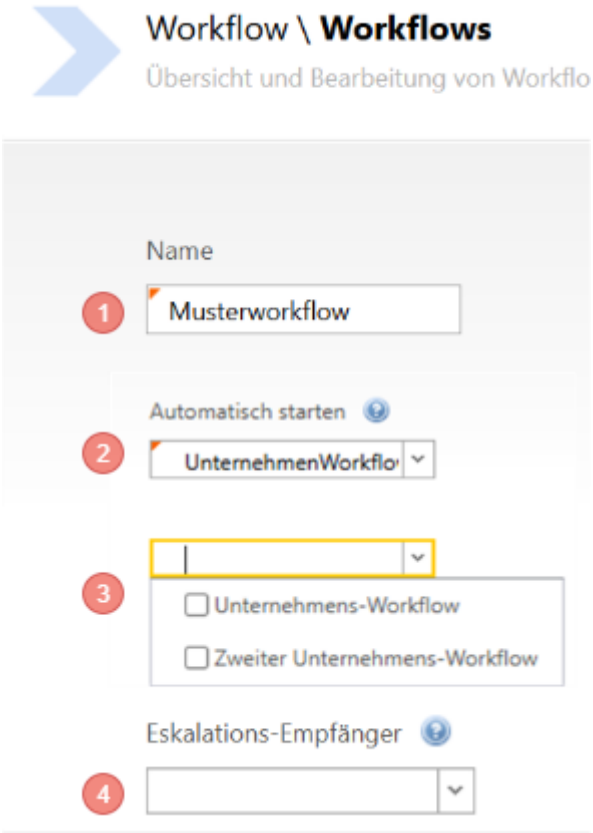
For this, the right <Role>/ Workflow -> "Workflow" must be activated and the corresponding Steps and Tasks must be created.

Workflow - Workflows

Order and Complaint workflows are attached to specific role rights by default and cannot be influenced here.

Individual Workflows

For individual workflows, you define a definition.



1. The name of the workflow should be a short description of the workflow. For example, "Complaint recorded" / "Send documents" or similar.
2. Specify for which type the workflow should be started. If you have not defined a workflow for a type, you must perform this step first.
3. If you have defined several jobs for the workflow, then select at which job the workflow should be started. Multiple can also be activated.
4. Set the escalation recipient for the workflow.

Set Status Values

Furthermore, in the "Manage Status" tab, you can define which statuses exist and which success type they should receive.

The following status values exist:

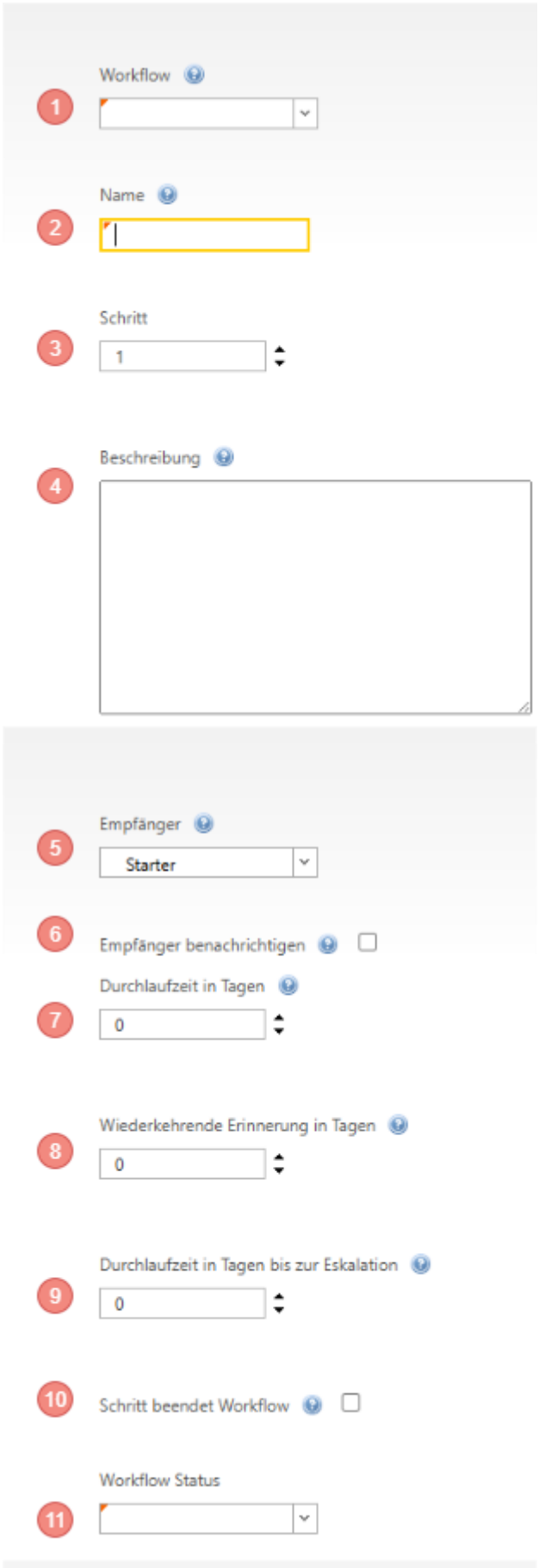
- Unchanged
- Successful
- Cancelled
- Unsuccessful

Using the pencil, you can assign an ID to individual entries (so that they can be further processed, for example) or change the name of the status.

By default, the values are pre-filled without an ID.

Workflow - Steps

A workflow can consist of various steps that either build on each other or interact differently among themselves.



1. Select the definition of the workflow via the drop-down menu (Mandatory field).

2. Assign a name (Mandatory field).

3. If your workflow consists of several steps, indicate which step you are currently creating.

4. If desired, set a description for the step.

5. Define the recipient of the workflow step

- Fixed assignment means that as soon as this workflow step is reached, the specified person automatically receives this step.
- Selection by workflow step owner means that the owner may decide to whom this step can be assigned.
- Selection from group means that a participant of this group can take the workflow.
- Workflow starter means that this person is selected who originally started the workflow. Usually, you only use this point for step 1.

6. Specify whether the recipient from (5) should be notified by E-mail. If checked, an E-mail address must be stored for the defined persons from (5).

7. Specify here until when the workflow step must be processed. If it is not processed in time, it will have a different colour in the client overview. If left at 0, there is no expiry date.

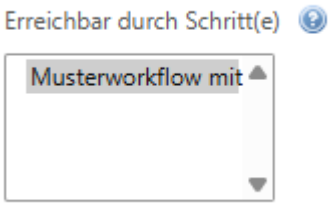
8. Specify here when the recipient from (5) should be reminded again. This reminder should sensibly lie between the date from (7) and (9). If left at 0, there is no reminder.

9. If a workflow is not processed or completed by the specified date from (7), the escalation recipient will be notified. If left at 0, there is no expiry date.

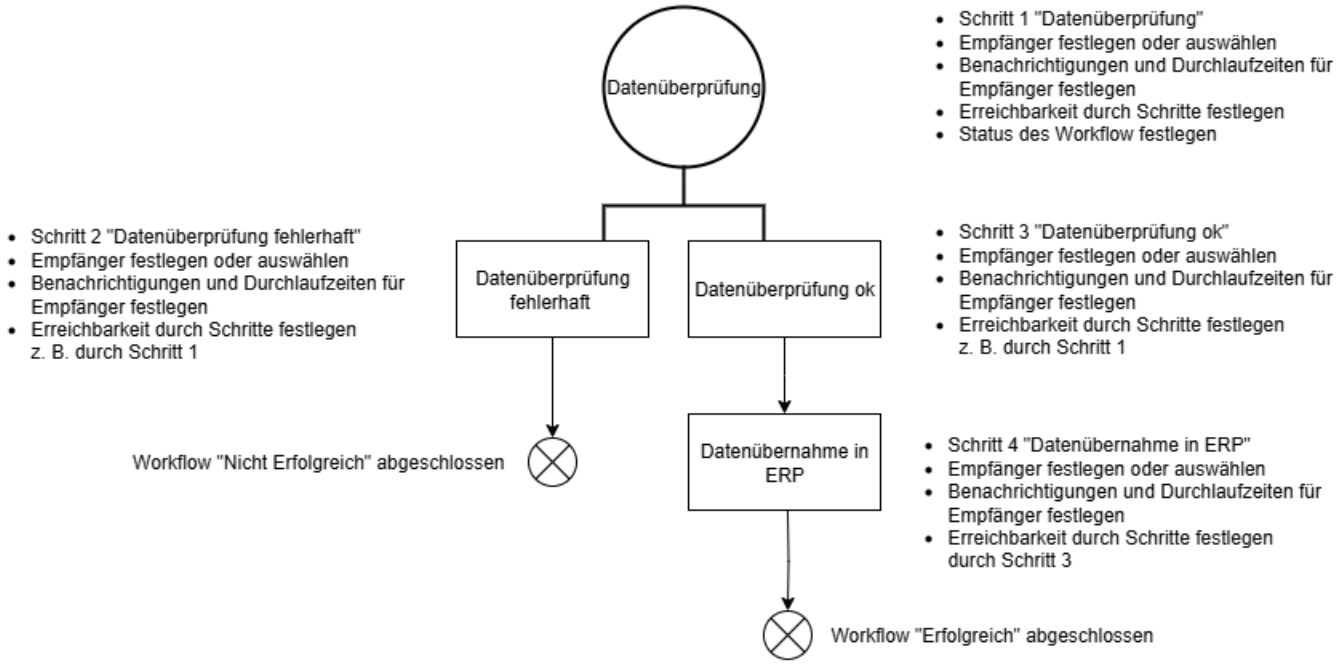
10. Specify whether the workflow is ended with this step (regardless of the set status).

11. Here you select the status that the workflow receives with this step. (Mandatory field)

If you define further steps, go through the points from (1) again. From workflow step 2 onwards, you also get the selection of how the current step can be reached:

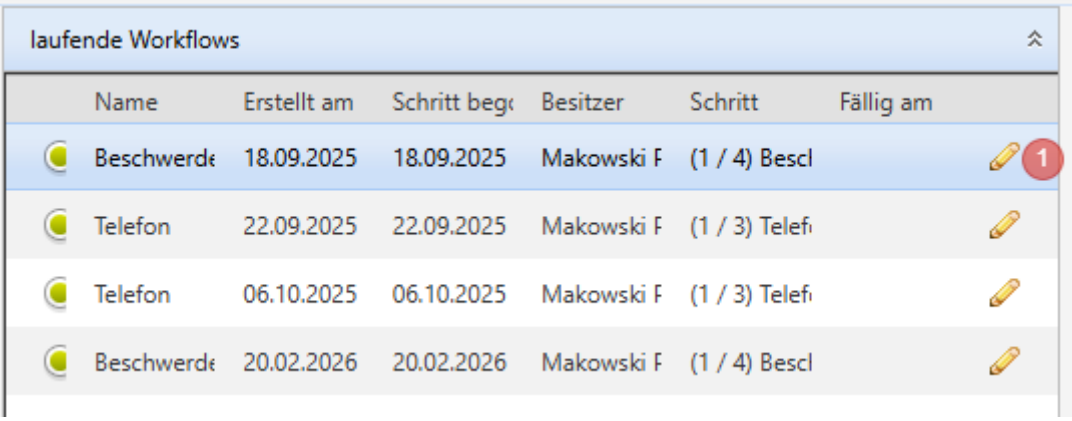


Example representation of a defined workflow


Datenüberprüfung
Schritt 1 "Datenüberprüfung"
Empfänger festlegen oder auswählen
Benachrichtigungen und Durchlaufzeiten für Empfänger festlegen
Erreichbarkeit durch Schritte festlegen
Status des Workflow festlegen
Schritt 2 "Datenüberprüfung fehlerhaft"
Empfänger festlegen oder auswählen
Benachrichtigungen und Durchlaufzeiten für Empfänger festlegen
Erreichbarkeit durch Schritte festlegen z. B. durch Schritt 1
Datenüberprüfung fehlerhaft
Datenüberprüfung ok
Schritt 3 "Datenüberprüfung ok"
Empfänger festlegen oder auswählen
Benachrichtigungen und Durchlaufzeiten für Empfänger festlegen
Erreichbarkeit durch Schritte festlegen z. B. durch Schritt 1
Workflow "Nicht Erfolgreich" abgeschlossen
Datenübernahme in ERP
Schritt 4 "Datenübernahme in ERP"
Empfänger festlegen oder auswählen
Benachrichtigungen und Durchlaufzeiten für Empfänger festlegen
Erreichbarkeit durch Schritte festlegen durch Schritt 3
Workflow "Erfolgreich" abgeschlossen

Workflow - Evaluation

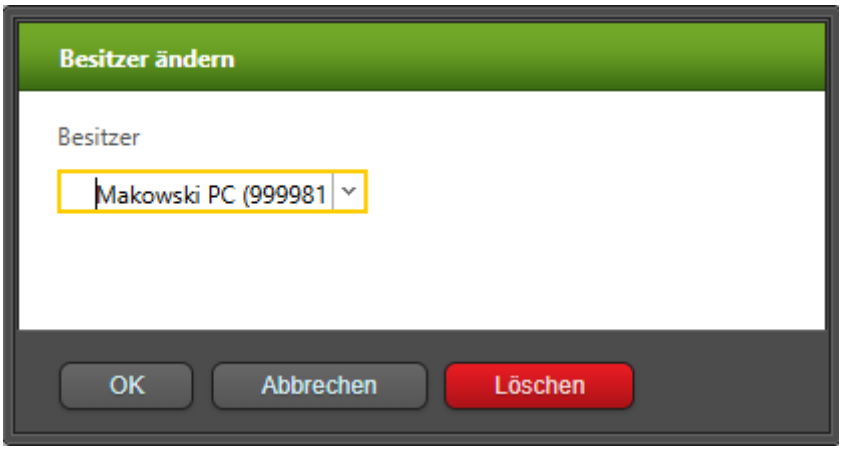
Workflow - Summary - ongoing workflows



1. The current owner of the workflow can be changed or the workflow can be deleted via the pencil icon.

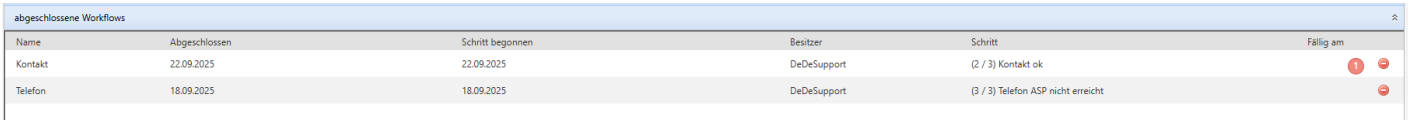
Colour code

- green:
  - Status "In progress"
- red:
  - Status "escalated"
- without colour code:
  - not assigned or step unknown
- Name
- Created on
- Step started
- Owner
- Step
- Due on
- Edit (pencil icon)
  - Here you can change the owner of the workflow:



Clicking on a workflow displays the Workflow Details.

Workflow - Summary - completed workflows



1. A completed workflow can be deleted via the icon.

Workflow Details (History)

Clicking on a workflow shows the details of the individual steps with any notes stored.